



2023 Income Tax Client Information Sheet

FIRST NAME	M.I.	LAST NAME	DATE OF BIRTH	SOCIAL SECURITY NUMBER
SPOUSE FIRST NAME	M.I.	LAST NAME	DATE OF BIRTH	SOCIAL SECURITY NUMBER
STREET ADDRESS				
CITY			STATE	ZIP
PRIMARY TAXPAYER PHONE NUMBER			SPOUSE PHONE NUMBER	
PRIMARY TAXPAYER E-MAIL			SPOUSE E-MAIL	
PRIMARY OCCUPATION			SPOUSE OCCUPATION	
DRIVER'S LICENSE # OR STATE ISSUED ID #			DRIVER'S LICENSE # OR STATE ISSUED ID #	
ISSUE DATE & STATE			ISSUE DATE & STATE	
EXPIRATION DATE			EXPIRATION DATE	

Dependents you are CLAIMING on your return this tax year

DEPENDENT FIRST NAME	LAST NAME	SOCIAL SECURITY NUMBER	DATE OF BIRTH	RELATIONSHIP TO TAXPAYER

Returning Client: ___ **New Client:** ___ **How did you hear about us?** _____

Business Name _____ **Corp** ___ **LLC** ___ **EIN:** _____

Preferred Contact Method: Phone ___ Email ___ Text ___

Please provide your bank information: Name: _____ **RT:** _____ **ACCT #:** _____

I have read and agree with the Professional Services Statement on the reverse side of this document.

Signature: _____ **Date:** _____

Professional Service Agreement – Tax Returns

J.W. Hopp & Associates, Inc. (hereinafter referred to as “we” or “us”) will prepare the federal and state tax return for the year indicated from the information that you provide. We will not prepare any other returns that you may be required to file, including payroll, gift, or personal property renditions without a separate agreement. If requested, we will fax or mail one copy of your tax return at no charge. Additional faxing or mailing of copies of your tax return will be done with a minimal fee for processing.

As professionals, we adhere to standards established by the appropriate professional and governmental bodies. We **will not** audit or verify the data you submit, although we may ask you to clarify it. Our work does not include procedures designed to discover defalcations or other irregularities, should they exist. We will use our judgment to resolve questions in your favor where the law is unclear or where there are conflicts of interpretation in the law. No information you provide to J.W. Hopp & Associates, Inc. is privileged. You agree to answer our questions and provide us information so that we can complete the return. You agree to provide all information to us in time for us to finish the return before the due date.

Payment Terms: For our services, you agree to pay us based upon our fee schedule in effect when the work is performed at the time of your appointment. If for any reason your account is turned over to a collection agency, an additional fee of fifty dollars will be added to cover collection costs. In addition, J.W. Hopp & Associates, Inc. will maintain possession of all records, including Forms W-2 and Forms 1099, until payment is made. In no event will further work be done if there are any unpaid invoices.

Reviews and Inquiries: Frequently the taxing authority will send inquiries regarding information provided on your taxreturn. Simple inquiries and requests for additional information will typically be handled by us at no charge.

Audits: The return is subject to examination by the taxing authorities. In the event of an audit, **YOU** will be required to produce documents, records, and other evidence to substantiate all of the entries on the tax return. If an examination does occur, we will represent you if you so desire; however, these additional services are not included in our fee for tax preparation.

Limited Warranty: In the event that we make an error on a tax return, we will change the return at no charge. If the error was discovered after the tax return was filed, we will prepare an amended return for no additional fee. If the error is discovered as the result of an audit, we will pay all interest and penalties on the portion of the tax due related to **OUR** error.

You agree to review the tax return prior to signing for completeness and accuracy. You will also verify the correct spelling of the names and taxpayer identifying numbers. You understand that you are ultimately responsible for the accuracy of this tax return. If you are filing a joint return with your spouse, you are signing this agreement jointly on his or her behalf. If you are filing as a business, you agree that you have the authority to sign this agreement.